

DEPARTMENT OF PUBLIC INSTRUCTION  
EDUCATION SERVICES FOR THE DEAF AND THE BLIND  
PROGRAM SERVICES

PROGRAM RECORDS RETENTION AND DISPOSITION SCHEDULE

**ORGANIZATIONAL NAME CHANGE**

An organizational name change to this Program Records Retention and Disposition Schedule is hereby approved. The Program Records Retention and Disposition Schedule reflects an organizational change from the **Department of Health and Human Services, Office of Education Services, Program Services** to the **Department of Public Instruction, Education Services for the Deaf and the Blind, Program Services**. No new items have been added, no items have been deleted, and no changes have been made to any existing series descriptions or disposition instructions in the most recent schedule dated June 27, 2002. In accordance with the provisions of Chapters 121 and 132 of the General Statutes of North Carolina, it is agreed that the records of the

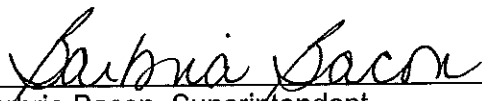
**PROGRAM SERVICES**


do not and will not have further official use or value for administrative, research, or reference purposes after the respective retention periods specified herein. The N.C. Department of Cultural Resources consents to the destruction or other disposition of these records in accordance with the retention and disposition instructions specified in this schedule. **Public records including electronic records not listed in this schedule or in the General Schedule for State Agency Records are not authorized to be destroyed.** The

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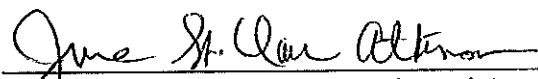
agrees to destroy, transfer or dispose of records in the manner and at the times specified herein. This schedule is to remain in effect until superseded.

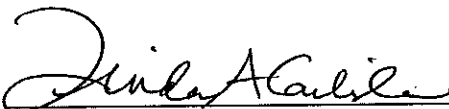
**APPROVAL RECOMMENDED**

  
Barbria Bacon, Superintendent  
Education Services for the Deaf and the Blind

  
Sarah E. Koonts, Director  
Division of Archives and Records

**APPROVED**

  
June St. Clair Atkinson, State Superintendent  
Department of Public Instruction

  
Linda A. Carlisle, Secretary  
Department of Cultural Resources

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CHILDREN WITH DISABILITIES**

**ITEM 49997. PRESCHOOL CHILDREN'S RECORDS FILE.**

Records concerning preschool children who are deaf or hard of hearing and visually impaired. File includes each child's name, evaluations of child, medical history, copy of birth certificate, consultations with teacher and parent/parents, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center 5 years after designated inactive. Records will be held for agency in the State Records Center 15 additional years and then destroyed.

**ITEM 49998. CHILDREN WITH DISABILITIES FILE.**

Records in paper and electronic formats concerning children with disabilities who are in educational programs. File includes achievement results; intelligence, eligibility, and physical test results; medical reports if the student is physically or mentally impaired; individual education plans (IEP's) and forms; multidisciplinary team reports; and screening, placement, referral, parental consent and notification forms, and correspondence. (Note: The parent, guardian, surrogate parent, or eligible student must be notified prior to destruction of personally identifiable information so copies of records can be provided if desired. Information must also be destroyed at the request of parents if no longer needed to provide educational services to the child. (Comply with applicable provisions of G.S. 115C-114 and 115C-402 regarding confidentiality and expungement of records of students with special needs.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records 5 years after student leaves the education program for children with disabilities if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved. Transfer records containing each student's name, address, phone number, grades, attendance records, classes attended, grade level completed, and year completed to the Inactive Students File (Item 50050) for permanent retention.

**ITEM 49999. PLANS OF OPERATIONS FILE.**

Records in paper and electronic formats of treatment plans for children with disabilities.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 2 years.

**ITEM 50000. TEXTBOOKS AND EQUIPMENT FILE.**

Records in paper and electronic formats of inventories of textbooks and special equipment needed for students participating in educational programs for children with disabilities.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 2 years.

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**ITEM 49996. RULES AND REGULATIONS FILE.**

Rules governing programs and services for children with special needs.

DISPOSITION INSTRUCTIONS: Destroy in office when superseded or obsolete.

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**ITEM 50001. GOVERNOR MOREHEAD SCHOOL BOARD MEMBERS FILE.**

Correspondence, memorandums, biographical data, and other information concerning board members.

DISPOSITION INSTRUCTIONS: Destroy in office after 20 years.

**ITEM 50002. GOVERNOR MOREHEAD SCHOOL BOARD MINUTES FILE.**

Official minutes of the Board of Directors.

DISPOSITION INSTRUCTIONS: Transfer a duplicate copy of the official signed minutes to an off-site storage location after each meeting for security storage. Arrange for delivery of original minutes to the State Records Center after 5 years to be microfilmed. (Agency personnel should contact the Imaging Unit, Collections Management Branch, to arrange for transfer of original minutes for microfilming.) Paper records will be destroyed in the State Records Center after microfilming. After completion of microfilming and all quality control procedures, the original copy (silver-halide) of microfilm will be transferred to the custody of the Archives for permanent storage in the vault. Destroy duplicate copies in the off-site storage location after the original records have been microfilmed.

**ITEM 50003. STUDENT/STAFF REPORTS FILE.**

Reports concerning vacancies, suspensions, transfers, and enrollment of students. (Comply with provisions of Federal Code 34 CFR 361.49 regarding the confidentiality of personal information in the possession of state agencies and the Individuals with Disabilities Education Act, Title 42, Chapter 126 USC regarding students with disabilities.)

DISPOSITION INSTRUCTIONS: Destroy in office vacancy, suspensions, and transfer reports after 6 months. Destroy in office enrollment reports after 2 years.

**ITEM 50004. CORRESPONDENCE/MEMORANDUMS FILE.**

Correspondence and internal memorandums concerning N.C. Schools for the Deaf.

DISPOSITION INSTRUCTIONS: Destroy in office after 5 years.

**ITEM 50005. AUDIT REPORTS FILE.**

Audit reports concerning N.C. Schools for the Deaf.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50006. STATISTICAL REPORTS FILE.**

Monthly statistical reports concerning the operation of the schools.

DISPOSITION INSTRUCTIONS: Destroy in office after 10 years.

**ITEM 50007. CORRESPONDENCE FILE.**

Records in paper and electronic formats of correspondence and memorandums written by the human resources manager. File also includes correspondence sent and received from other departments and agency human resources offices.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 4 years.

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**ITEM 50008. SUPERINTENDENT AND SCHOOL DIRECTORS' SUBJECT FILE.**

Records in paper and electronic formats concerning the administration and operation of the school. File includes correspondence with associations, councils, foundations, Department of Health and Human Services, General Assembly, and various other organizations.

DISPOSITION INSTRUCTIONS: Print electronic records and interfile with related paper records. Destroy in office electronic versions of records after 5 years. Transfer paper records to the State Records Center after 5 years. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives

**ITEM 50009. TRANSITORY CORRESPONDENCE FILE.**

Reference copies of school directors' routine outgoing correspondence.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

**ITEM 50010. SCHOOLS FOR THE BLIND FILE.**

Correspondence with other schools for the blind.

DISPOSITION INSTRUCTIONS: Destroy in office after 5 years.

**ITEM 50011. SCHOOL HISTORY FILE.**

Scrapbook collection of news articles and historical data concerning the schools'

DISPOSITION INSTRUCTIONS: Retain in office permanently.

**ITEM 50012. SUMMER CONFERENCE FILE.**

Records in paper and electronic formats of potential students who may attend summer conferences at the schools.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50015. COUNSELORS' SUBJECT FILE.**

Records concerning colleges, technical schools, information sources, follow-up studies, office administration, travel, and various other records relating to counseling of students. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Transfer records relating to a particular student to Student Records, Inactive Student Records File (Item 2206) when student terminates enrollment. Destroy in office remaining records when reference value ends.

**ITEM 50016. PROGRESS REPORTS FILE.**

Records concerning children and their adjustment to living on campus and in a residential setting. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office after 5 years.

**ITEM 50017. ANNUAL DROPOUT REPORTS FILE.**

Records in paper and electronic formats of annual reports concerning students who have dropped out of school and their demographic information.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years.

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**ITEM 50018. ATHLETIC PROGRAM FILE.**

Records concerning athletic programs. File includes student eligibility records, physical examinations, parental consent forms, waivers, application forms, entry forms, schedules, participation requirement forms, handbooks, and other related records. (Comply with applicable provisions of 42 USC 1320d-2(d)(2) regarding confidentiality of medical information and 20 USC 1232g regarding confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office after 2 year(s) if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50019. CURRICULUM FILE.**

Records in paper and electronic formats concerning the establishment of course requirements in the various areas of study such as vocational and technical programs, English, foreign languages, mathematics, social sciences, fine and performing arts, and healthful living. File includes approved instructional resources, objectives, methods of evaluation, handbooks, curriculum course guides, assessment guides, and testing guides.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when superseded or obsolete.

**ITEM 50020. EXCEPTIONAL CHILDREN'S HEADCOUNT REPORTS FILE.**

Records in paper and electronic formats of annual reports listing statistics concerning exceptional children. (Reports are used as a basis for federal funding and individualized

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years.

**ITEM 50021. FIELD TRIP AUTHORIZATION FILE.**

Records concerning the approval or disapproval for students to leave school on field trips. File includes dates of trips, purpose of trips, trip destinations, itineraries, and other related information. File also includes parental consent forms.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

**ITEM 50022. GUIDANCE FILE.**

Records in paper and electronic formats concerning counseling sessions held with students. File includes guidance and counseling records, parental consent forms to release information, scholarship and award information, students' grades and course selections, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50023. ANNUAL REPORTS ON GRADE, RACE, AND SEX FILE.**

Records in paper and electronic formats of annual reports concerning the race and sex of students in each grade.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years.

**ITEM 50024. PARENT CONFERENCE FILE.**

Records concerning conferences between parents, teachers, and/or other school officials. File includes correspondence, parent conference forms outlining reasons for conference, actions taken, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

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**ITEM 50025. PRINCIPAL/ADMINISTRATORS' MONTHLY REPORTS FILE.**

Records in paper and electronic formats of monthly reports prepared by each school's principal or program administrator sent to the central office. Monthly reports list total number of student enrollments and withdrawals for a given month; date and time of report, and schools' names, addresses, and phone numbers.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50026. REGIONAL ARTICULATION PLACEMENT FILE.**

Records in paper and electronic formats used to report a student's completion of course work, which could be used for credit at an area college or university. File includes students' names, addresses, phone numbers, schools attended, descriptions of courses, final grades, and other related records. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records 2 years after students graduate.

**ITEM 50027. RESIDENCE VERIFICATION FILE.**

Records in paper and electronic formats of completed forms and supporting documentation verifying each student's residence.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 8 years.

**ITEM 50028. SCHOLARSHIP PROGRAM FILE.**

Records in paper and electronic formats concerning student scholarships and honor societies. File includes scholarship applications, lists of eligible students, lists of winners and alternates, teacher evaluations and comments, and lists of students selected for National Honor Society.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when reference value ends.

**ITEM 50029. STUDENT ACTIVITY REPORTS FILE.**

Records in paper and electronic formats of annual reports concerning students and their classroom assignments, classroom settings, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years.

**ITEM 50030. SCHOOL LIBRARY/MEDIA CENTER FILE.**

Records in paper and electronic formats concerning the management of school libraries. File includes accession records, circulation records, holding catalogs, patron assistance, requests, shelf lists, and payments for late, damaged, or lost material.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 1 year if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50031. SCHOOL ACTIVITY REPORTS FILE.**

Records in paper and electronic formats of reports and lists prepared by various programs. File includes school activity reports, principals', administrators', and teachers' monthly reports.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

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**ITEM 50032. SCHOOL VIOLENCE REPORTS FILE.**

Records in paper and electronic formats of reports on school violence completed by each school/program director and submitted to the department in accordance with Directive III-V, which is a policy on the exploitation, neglect, and abuse of children and clients served by the department. File includes names of schools, number of incidents reported, number of offenders and victims, actions taken, investigative, incident, and Division of Social Services reports, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50033. DEPARTMENT OF PUBLIC INSTRUCTION (DPI) STATISTICAL REPORTS FILE.**

Reports prepared by the Department of Public Instruction and used by a school/program for planning and long range tracking of programs. File includes ABC's of public education, block schedule achievement, report card, alternative learning evaluation, student performance, behavior survey, testing results reports, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

**ITEM 50034. STUDENT HANDBOOK FILE.**

Records in paper and electronic formats of handbooks supplied to students at the beginning of each school year. File includes attendance and school policies and procedures, graduation requirements, disciplinary policies and procedures, academic policies, and general school, division, and department rules and regulations.

DISPOSITION INSTRUCTIONS: Retain in office 1 copy of paper handbooks permanently. Transfer 10 or more paper copies ( as required) of each publication to the State Documents Clearinghouse, State Library of North Carolina, when received from printer, in accordance with G.S. 125-11.8 (b). Destroy in office remaining paper copies and related records when reference value ends. Destroy in office electronic records after 1 year.

**ITEM 50035. TEACHER LESSON PLAN FILE.**

Records in paper and electronic formats used by teachers for the classes or subjects they are assigned to teach. File includes worksheets, discussion notes, problem solving materials, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when superseded or obsolete.

**ITEM 50036. TEACHER SCHEDULING FILE.**

Records in paper and electronic formats of reports documenting teachers' course schedules and timetables. File includes teacher timetable reports, room timetable reports, course load by teacher reports, teacher directives, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when reference value ends.



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**ITEM 50037. COMPREHENSIVE CLINIC DIRECTOR'S SUBJECT FILE.**

Records in paper and electronic formats concerning operations or management of the clinic. File includes correspondence, memorandums, catalogs, infirmary, students' insurance information, statistical records, American Printing House correspondence, reference copies of bills and orders, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding confidentiality of medical information.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 1 year.

**ITEM 50038. STUDENT HEALTH CHARTS FILE.**

Records concerning health care administered to students. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding medical information.)

DISPOSITION INSTRUCTIONS: Transfer to Student Records, Inactive Student Records File (Item 50050) when students terminate enrollment.

**ITEM 50039. HEALTH PROGRAM DAILY REPORT FILE.**

Reports concerning medication administered to students at the infirmary. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

DISPOSITION INSTRUCTIONS: Transfer to Student Records, Inactive Student Records File (Item 50050) when students terminate enrollment.

**ITEM 50040. DAILY MEDICATION CHARTS FILE.**

Records concerning medication administered to students at the infirmary. File includes daily controlled substance log. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

**ITEM 50041. MONTHLY MEDICAL REPORTS FILE.**

Medical reports concerning students' monthly visits to the infirmary. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2 (d)(2) regarding the confidentiality of medical information.)

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

**ITEM 50042. PSYCHOLOGISTS FILE.**

Records concerning psychologists' evaluation reports of students and raw data. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

DISPOSITION INSTRUCTIONS: Transfer evaluation reports to Student Records, Inactive Student Records File (Item 50050) when student terminates enrollment. Destroy in office raw data when student terminates enrollment.

**ITEM 50043. DIAGNOSTIC AND SUMMARY REPORTS FILE.**

Reports from physicians documenting a student's chronic health condition. (Records may be retained as part of student's cumulative record or retained separately. If retained separately, records should be merged with student's cumulative record upon student's departure from school system.) (Comply with applicable provisions of 20 USC 1232g regarding confidentiality of student records and 42 USC 1320d-2(d)(2) regarding confidentiality of medical

DISPOSITION INSTRUCTIONS: Transfer to Student Records, Inactive Student Records File (Item 50050) when student terminates enrollment.

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**ITEM 50044. INJURY REPORTS FILE.**

Records in paper and electronic formats concerning medical attention provided to students on campus by school officials. File includes injury report forms. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records when student reaches 29 years of age and has not received services within the last 10 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues

**ITEM 50045. PRE-SCHOOL THROUGH KINDERGARTEN HEALTH ASSESSMENT FORMS FILE.**

Records concerning physical examinations necessary for students to enter kindergarten. File includes initial immunization records and results of physical examinations. (Comply with applicable provisions of G.S. 130A-441 regarding confidentiality of health assessment records and 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Retain in office permanently doctor signed, clinic stamped immunization records. Destroy in office remaining records when student completes elementary school.

**ITEM 50046. MEDICATION AND PROCEDURES LOG FILE.**

Records in paper and electronic formats of yearly log documenting medication administered and performance of skilled procedures provided to students by nurses and designated school or program staff. (Comply with applicable provisions of 20 USC 1232G regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records when student reaches 29 years of age and has not received services within the last 10 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues

**ITEM 50048. PERMANENT HEALTH RECORD CARDS FILE.**

Cards that provide information on a student's medical history and status while in a school or program. File includes immunization information, vision and hearing screening results, health status including chronic illness, seizures, allergies, special health considerations, and narrative notes entered by nurses or other school or program officials. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

**DISPOSITION INSTRUCTIONS:** Transfer to Student Records, Inactive Student Records File (Item 2206) when student terminates enrollment.

**ITEM 50049. PHYSICIANS' AUTHORIZATION FORMS FILE.**

Authorization forms from physicians authorizing health care procedures to be performed on a student. File includes orders to administer prescribed medicines, medical treatments, parents' authorization signatures, and other related records. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office when student reaches 29 years of age and has not received services within the last 10 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

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**ITEM 50050. INACTIVE STUDENTS RECORDS FILE.**

Inactive school student records. File includes academic records, cumulative records, and various health records. (Prior to July 1, 1999, this series contained only Governor Morehead School student files.) (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Transfer to the State Records Center after 25 years to be microfilmed. Paper records will be destroyed in the State Records Center after microfilming. After completion of microfilming and all quality control procedures, the original copy (silver-halide) of microfilm will be transferred to the custody of the Archives for permanent storage in the vault. A duplicate copy of the microfilm will be purchased and retained permanently by the agency.

**ITEM 50051. STUDENT INFORMATION FILE.**

Records from kindergarten through high school concerning each student enrolled in an Office of Education Services school. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Transfer to the State Records Center 7 years after student terminates enrollment to be microfilmed. Paper records will be destroyed in the State Records Center after microfilming. After completion of microfilming and all quality control procedures, the original copy (silver-halide) of microfilm will be transferred to the custody of the Archives for permanent storage in the vault.

**ITEM 50052. ACTIVE STUDENT RECORDS FILE.**

Active school student records. File includes admission records, medical records, correspondence, evaluations, and various other social and academic records. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records)

**DISPOSITION INSTRUCTIONS:** Transfer to Inactive Student Records File (Item 50050) when student terminates enrollment.

**ITEM 50053. NORTH CAROLINA PUBLIC SCHOOL REGISTER FILE.**

Records in paper and electronic formats of registers listing students' grades and absenteeism information. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records when student terminates enrollment.

**ITEM 50054. NON-STUDENTS EVALUATIONS FILE.**

Records concerning children who are referred by local education agencies for evaluation. File includes evaluation reports. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office after 10 years or when child reaches age 18, whichever occurs later.

**ITEM 50055. CUMULATIVE PLANS FILE.**

Individual education plans concerning each student. File includes academic information, report cards, correspondence, Scholastic Aptitude Test, competence, and achievement testing results. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Transfer to Inactive Students Records File (Item 50050) when student terminates enrollment.

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**ITEM 50057. EXAMINATION MATERIALS FILE.**

Records concerning the administering of local or state standardized examinations and tests that measure students' performance at level of acquired knowledge. File includes all testing materials and student-completed answer forms. (Comply with applicable provisions of G.S. 115C-174.13 regarding confidentiality of records containing the identifiable scores of individual students.)

**DISPOSITION INSTRUCTIONS:** Destroy in office student-completed answer forms for all tests containing responses and modified versions 6 months after the return of students' test scores. Testing coordinators should contact the Office of Education Services, Accountability Director for procedures for recycling and destroying remaining test materials.

**ITEM 50058. EXAMINATION REPORTS FILE.**

Records in paper and electronic formats concerning the administering of a standardized examination. File includes class record sheets, summary goal reports, individualized and class roster reports, and other related records. (Comply with applicable provisions of G.S. 115C-174.13 regarding the confidentiality of records containing identifiable scores of individual students.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records 3 years after test scores are posted to individual student's North Carolina cumulative record.

**ITEM 50059. NORTH CAROLINA CUMULATIVE RECORDS FILE.**

Cumulative records of students' pre-school, elementary, and secondary educational career. File includes personal and family information, health and immunization records; attendance reports; standardized test dates and results; pre-school, elementary, middle, and high school inserts or grade sheets; copies of birth certificates; and drivers' education certificates. File also includes photographs; correspondence to and from parents or legal guardians and school personnel; and court order documents such as birth dates and name change verifications; and references to dates of separation due to graduation, withdrawal, or expulsion. (Comply with applicable provisions of G.S. 115C-402 regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Function and records transferred to Cumulative Plans File (Item 31336).

**ITEM 50060. STANDARD AND INDIVIDUALIZED ACTION PLANS FILE.**

Records concerning plans for students with life threatening and/or chronic health conditions that describe procedures to be performed by school or program staff on the student throughout the year. (Plan should be attached to the student's permanent health record card while in use. Note on permanent health record card when plan is discontinued.) (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records and 42 USC 1320d-2(d)(2) regarding the confidentiality of medical information.)

**DISPOSITION INSTRUCTIONS:** Destroy in office when superseded or obsolete.

**ITEM 50061. STUDENT ABSENTEE REPORTS FILE.**

Records in paper and electronic formats of daily, weekly, and monthly reports or bulletins listing names of students absent from school the previous day, reason for the absence, and whether the absence is excused or unexcused. File includes each student's name, gender, homeroom number, teacher's name, and reason for absence. File also includes student's social security number or exceptional children's identification number. (Comply with applicable provisions of 5 USC Section 552a and G.S. 132.1-10 regarding confidentiality of records maintained on individuals.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records when reference value ends.

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**ITEM 50062. STUDENT ATTENDANCE (SCHOOL) FILE.**

Records in paper and electronic formats concerning each student's daily, weekly, monthly, and yearly school attendance. File includes individual pupil reports compiled from students' classroom attendance records. File includes each student's name, address, school, homeroom assignment, gender, race, birth date, and total number of absences by day. (Records may be maintained in addition to a student's cumulative record.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records 5 years after appropriate information has been posted to each student's cumulative record.

**ITEM 50063. STUDENT CHECK IN AND OUT FILE.**

Records in paper and electronic formats of daily logs documenting when students arrive late or leave school early. File includes students' names, arrival, departure, and re-admit times; teachers' names, and other related records.

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records after 2 years.

**ITEM 50064. STUDENT CLASS WORK FILE.**

Records concerning material used in the classrooms by teachers and students. File includes non-standardized test material, term papers, completed homework assignments, assignment books, notebooks, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office when reference value ends.

**ITEM 50065. STUDENT DISCIPLINE FILE.**

Records in paper and electronic formats used to report and review adverse student behavior. File includes violent incident reports; disciplinary action plans; classroom detention notices; in- school and out-of-school suspension records; correspondence between parents and/or guardians and school personnel; supporting records describing students' behavior, facts and circumstances surrounding incidents, and actions taken by school officials and/or law enforcement officers. File also includes school violence reports and suspension reports when used as required by Directive III-V and G.S. 115C-391. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records after 5 years.

**ITEM 50066. STUDENT DROPOUT FILE.**

Records in paper and electronic formats used to track student withdrawals from school. File includes students' names, ages, race, gender, grade levels, dates of withdrawals, reasons for withdrawals, suspension and family data, intervention/prevention profiles, and monthly summaries of all dropouts. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records after 5 years.

**ITEM 50067. STUDENT ENTRY AND WITHDRAWAL FILE.**

Records in paper and electronic formats of logs showing when students enter or withdraw from school. File includes student information sheets, withdrawal forms, students' names, family data, identification numbers, reasons for withdrawal or transfers, current grade levels, students' grades and absences to date, and signatures of school personnel. (Comply with applicable provisions of G.S. 115C-402 regarding the confidentiality of student records.)

**DISPOSITION INSTRUCTIONS:** Destroy in office paper and electronic records after 3 years.

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**ITEM 50068. STUDENT GRADE (CLASSROOM) FILE.**

Records in paper and electronic formats of teachers' records of individual student's grades. File includes teachers' grade books, progress reports, bubble sheets, grade reports for each nine week grading period for the school year. (Grades are used to compute semester and yearly averages for each student by subject.) (Comply with applicable provisions of 20 USCA 1232g regarding confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records 1 year after appropriate information has been posted to students' cumulative record.

**ITEM 50069. STUDENT GRADE (SCHOOL) FILE.**

Records in paper and electronic formats of school records showing individual student's grades. File includes listing of student grades by subject for each nine week grading period or midterm averages, students' final grades, whether promoted or held back. File also includes student report cards and marks gathering forms. (Comply with applicable provisions of 20 USC Section 1232g regarding confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records 5 years after appropriate information has been posted to students' cumulative record.

**ITEM 50070. STUDENT ORGANIZATIONS FILE.**

Records concerning student organizations at each school. File includes membership lists, activities, scrapbooks, student newspapers, student organizations' minutes, and other related records.

DISPOSITION INSTRUCTIONS: Transfer records with historical value to Schools/Programs and Central Office, School History File (Item 50011). Destroy in office remaining records when reference value ends

**ITEM 50071. STUDENT SCHEDULING FILE.**

Records in paper and electronic formats of reports documenting a student's course selection and timetables. File includes course loads, student reports, timetable reports, course selection and verification reports and slips, and student scheduling reports. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when reference value ends

**ITEM 50072. STUDENT TRANSFER FILE.**

Records in paper and electronic formats concerning the transfer of students within or out of county. File includes transfer forms listing students' and parents' names, addresses, grade levels, names of schools, reasons for transfers, tuition receipts, statements of approval or denial, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

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**ITEM 50073. NORTH CAROLINA WINDOW ON STUDENT EDUCATION (NCWISE) AND  
COMPREHENSIVE EXCEPTIONAL CHILDREN'S ACCOUNTABILITY SYSTEM (CECAS) DATABASE  
(ELECTRONIC) FILE.**

Electronic records used to manage various types of student records and generate reports. Electronic file includes students' names, dates of birth, parents' names, grade level, students' academic status, attendance data, course selection and verification, academic progress information and grades, honor role designations, exceptionalities, personal identification codes, and other related data. Data is transmitted to the central office and the Department of Public Instruction. (Comply with applicable provisions of G.S. 115C-402 and 20 USC 1232g regarding the confidentiality of student records.) (File maintenance and backup procedures conducted by Division of Information Resource Management (DIRM).)

**DISPOSITION INSTRUCTIONS:** Update in office routinely. Destroy in office student specific information when it has been posted to student's cumulative record and reference value ends. Destroy in office data used to generate reports according to disposition instructions for those specific reports.

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TEXTBOOK RECORDS**

**ITEM 50074. TEXTBOOK RECORDS.**

Reports summarizing textbook inventories from individual schools or the central office. File also includes invoices for books and requests from schools to order books.

DISPOSITION INSTRUCTIONS: Destroy in office after 5 year(s) if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50075. SUMMARY SHEETS FILE.**

Records in paper and electronic formats concerning specific historical books compiled from the individual school inventories.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 2 years.



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**ITEM 50076. VOCATIONAL TRAINING PROGRAMS FILE.**

Records concerning the development and management of vocational training programs. File includes correspondence, memorandums, reference copies of time and travel records, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Vocational Plans and Training Programs File (Item 47614).

**ITEM 50077. ACTIVITY, CLASS, AND WORK SCHEDULES FILE.**

Records in paper and electronic formats concerning students' activities, classes, and work schedules. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50078. COOPERATIVE AND PREPARATORY TRAINING FORMS FILE.**

Cooperative agreements between school program and businesses. File includes outline of program rules and policies, expectations for students, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office after 5 years.

**ITEM 50079. INSTRUCTIONAL PERSONNEL FILE.**

Records concerning instructional personnel for vocational education classes. File includes reference copies of certificates, board appointments, and other related records

DISPOSITION INSTRUCTIONS: Destroy in office after 5 years

**ITEM 50080. STUDENT FOLLOW UP FILE.**

Records in paper and electronic formats concerning follow up studies of former students of vocational education programs.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50081. VOCATIONAL PLACEMENT FILE.**

Records in paper and electronic formats concerning the placement of students enrolled in vocational and technical programs. File includes apprenticeships and cooperative placement records and reports showing names of students, companies employing students, job titles, percentage of students placed, and other related records. (Comply with applicable provisions of 20 USC 1232g regarding the confidentiality of student records.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years.

**ITEM 50082. VOCATIONAL PLANS AND TRAINING PROGRAMS FILE.**

Records in paper and electronic formats concerning the development plans of a school's or program's vocational and technical program and students involvement in these programs. File includes comprehensive descriptions of programs which list courses taught, levels of enrollment by program and school, funds spent, comparative testing data, placement data, outlines of objectives for future improvement, requests for funds and teaching positions for upcoming academic year, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when reference value ends.

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**ITEM 50089. SUPPORT INFORMATION FILE.**

Records in paper and electronic formats of code sheets, check lists, athletic fund ticket sales records, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50083. SUBJECT FILE.**

Records in paper and electronic formats of financial correspondence concerning continuation, expansion, and capital improvement budgets. File includes records relating to various program topics of interest to the schools.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years if no litigation, claim, audit, or other official action has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50084. LOGS AND REGISTERS FILE.**

Records in paper and electronic formats of various logs and registers recording schools' financial transactions. File includes voucher and batch logs, validation records, detail error journals, encumbrance error listing, trial balances, overdraft reports, fund summaries, transaction control reports, update and monthly control sheets, transaction control reports, monthly check voucher reports, college tuition fee logs for school graduates, numerical purchase orders, data mailing logs, diskette data logs, bank deposit number logs, and postage

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50085. FINANCE REPORTS FILE.**

Records in paper and electronic formats of reports documenting schools' financial actions. File includes sales and use tax monthly reports, milk and lunch reimbursement monthly reports, crippled children reimbursement reports, and donated commodities reports.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50086. VOUCHER CORRESPONDENCE FILE.**

Uncleared check voucher correspondence.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 year(s) if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50087. SYSTEMS FILE.**

Records in paper and electronic formats concerning the Fixed Asset and Accrual Systems.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 5 years if no litigation, claim, audit, or other official action has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

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**ITEM 50088. GRANTS AND SPECIAL PROJECTS FILE.**

Records in paper and electronic formats concerning special projects and various grant records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records 5 years following the date of submission of the final expenditure report for the period to which the report pertains. If any litigation, claim, audit, negotiation, or other official action involving the records has been initiated before the end of the three-year period, the records shall be retained until all issues are resolved, or until the end of the regular three-year period.

**ITEM 50090. DRAWINGS, SPECIFICATIONS, BLUEPRINTS FILE.**

Reference copies of records concerning buildings on the schools' campuses. File includes buildings' drawings, specifications, and blueprints. (Comply with applicable provisions of G.S. 132-1.7 regarding the confidentiality of building plans.)

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

**ITEM 50091. TRUST ACCOUNT FILE.**

Correspondence, vouchers, bills, and supporting papers concerning the following trusts: Hass Fund, Harriet M. Meyer Fund, Freeland Estate, Simpson Fund, Philpot Clothing Fund, Carrie Costner Loan Fund, and Student Fund. File also includes reference copies of wills, court papers, and trust agreements.

DISPOSITION INSTRUCTIONS: Destroy in office vouchers and bills after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved. Destroy in office remaining records when reference value ends.

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FOOD SERVICES**

**ITEM 50092. FOOD SERVICE FILE.**

Records concerning management and operation of the Food Services unit. File includes school lunch planning records, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends if no litigation, audit, claim, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues

**ITEM 50093. FOOD SERVICES PROGRAM FILE.**

Records in paper and electronic formats concerning food service programs. File includes daily, weekly, and monthly reconciliation reports; daily meal production records; commodity inventory reports; receipt reports; analysis reimbursement and claim reports; verification reports; and other related records created according to United States Department of Agriculture (USDA) regulations. (Records may be maintained at the individual school/program or at the central office.)

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

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PERSONNEL**

**ITEM 50094. PERSONNEL FILE.**

Records concerning school employees (but not employees of the main office). File includes applications for employment, personnel action forms, staff certifications, withholding reports, increment or change in basic salary forms, reference letters, notifications of reclassification, personal histories, and other related information. (Comply with provisions of G.S. 126-22, 126-23, and 126-24 regarding the confidentiality of personnel records.)

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center 5 years after employee terminates service. Records will be held for agency in the State Records Center 25 additional years and then destroyed. Destroy records currently held in the State Records Center 30 years from date of record.

**ITEM 50095. CORRESPONDENCE FILE.**

Correspondence in paper and electronic formats received from or sent to agency human resources offices and other state government offices.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 4 years.

**ITEM 50096. STAFF CERTIFICATION FILE.**

Records concerning Office of Education Services staff certifications. File includes renewal records and other related information.

DISPOSITION INSTRUCTIONS: Records transferred to Personnel File (Item 50094).

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TRANSPORTATION**

**ITEM 50098. TRANSPORTATION REPORTS FILE.**

Records in paper and electronic formats of summary reports that list activities of a school's transportation department. File includes number of days fleet was in operation, total number of miles activity buses were driven, number of activity buses driven, list of local expenditures, transportation policy questionnaires, inventory data, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years.

**ITEM 50099. ACCIDENT REPORTS AND TORT CLAIMS FILE.**

Records concerning accidents involving school buses or school transportation service vehicles and claims. File includes accident reports, plaintiffs' affidavits, and notices of tort claims.

DISPOSITION INSTRUCTIONS: Destroy in office 7 years after settlement of claim.

**ITEM 50100. ACTIVITY BUS INSPECTION REPORTS FILE.**

Inspection reports of school activity buses and school transportation vehicles.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 years if no litigation, claim, audit, or other official action has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50101. CONTRACTED TRANSPORTATION SERVICES FILE.**

Records in paper and electronic formats concerning contracted transportation services. File includes contracts, bus routes, bus passenger reports, annual transportation reports, inspection reports, agreements with parents, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records 5 years after expiration of contract if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50102. COST OF TRANSPORTATION FILE.**

Records concerning the operation, maintenance, replacement, vehicle insurance, and reimbursements. File includes requisitions, expenditure reports, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 year(s) if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50103. ACTIVITY BUS INVENTORY AND MAINTENANCE FILE.**

Records in paper and electronic formats concerning the maintenance of activity buses or school transportation service vehicles. File includes inspection worksheets, oil filter reports, fuel receipts, preventative maintenance charge tickets, inventories, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**ITEM 50104. SCHOOL BUS ROUTES FILE.**

Records in paper and electronic formats concerning routes taken by activity buses and transportation service vehicles. File includes description of routes, passenger lists, bus run reports, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years.

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**ITEM 50105. SEAT BELT AND CHILD RESTRAINT SYSTEMS FILE.**

Records concerning the use and installation of seat belts and child safety restraint systems in activity buses and transportation service vehicles. File includes consent forms, students' names, bus numbers and routes, dates system requested, types of systems requested, and signatures of school staff and students' parents or guardians.

DISPOSITION INSTRUCTIONS: Destroy in office when superseded or obsolete.

**ITEM 50106. TRANSPORTATION RECORDS FILE.**

Records in paper and electronic formats concerning school activity bus maintenance and use.

File includes number of hours driven, refund and material received reports, and transportation charges. File also includes summaries, reports, transportation audits, and other

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records after 3 years if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.